

REQUEST FOR PROPOSALS

PUBLIC EDUCATION AND MARKETING

For

THE I-680 SMART CARPOOL LANE PROJECT

Issued by:

Alameda County Congestion Management Agency

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Alameda County Congestion Management Agency
1333 Broadway, Suite 220,
Oakland, CA 94612

Request for Proposals (A06-019)
Public Education and Marketing
for
the I-680 Smart Carpool Lane Project

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Public Education and Marketing for the I-680 Smart Carpool Lane Project

SECTION 1: INTRODUCTION AND OVERVIEW

The Governor of California signed AB 2032 in September 2004 to authorize the design, construction, implementation and operations of the Sunol Smart Carpool Lane (also known as the I-680 Smart Carpool Lane) as a four-year demonstration project. The legislation established a Joint Powers Authority, the Sunol Smart Carpool Lane JPA (SSCLJPA), as the administering agency to oversee all phases of the Smart Carpool Lane from design to on-going operations. The SSCLJPA Joint Powers Agreement was executed in January 2006. The Authority Board of Directors is comprised of elected officials representing the Alameda County Transportation Improvement Authority (ACTIA), the Santa Clara Valley Transportation Authority (VTA), and the Alameda County Congestion Management Agency (ACCMA).

The ACCMA was designated as the Managing Agency for the project. The ACCMA has been working in cooperation with Caltrans, California Highway Patrol and the Bay Area Toll Authority on the design and operation of the Smart Lane. A Management Steering Committee representing the aforementioned participating agencies is providing technical oversight.

The project will convert the existing southbound HOV Lane over Sunol Grade into a High Occupancy Toll lane by implementing an Electronic Toll System (ETS) in the lane as Caltrans widens the overall facility to standard widths.

The project is in the preliminary design phase. The environmental documentation and Project Study Report/Project Report have been approved by Caltrans and FHWA. An Electronic Toll Systems (ETS) Engineer consultant has been retained and is in the process of developing the requirements for the electronic toll system.

A public meeting on the I-680 Smart Carpool Lane was held in the City of Fremont in October 2005. The meeting had extensive media coverage including newspaper articles, press releases, and television and radio spots. A website was launched providing a virtual open house. Although the attendance at the meeting was low, there were 18,000+ hits on the website. A summary report was prepared and presented to the SSCLJPA and can be found on the I-680 Smart Carpool Lane website at www.680smartlane.org.

This project will be funded by a combination of Federal funds and funds from Alameda County's Measure B, which is administered by ACTIA.

Smart Carpool Lane Project Description:

In order to operate the Smart Carpool Lane, there are two primary components to be built:

- a) an HOV lane constructed for Toll Operation (Smart Lane roadway work), and
- b) an Electronic Toll System (hardware and software).

a) Smart Carpool Lane Roadway Work

The Smart Carpool Lane roadway work to be included in the Caltrans HOV lane widening contract includes:

- Electrical work,
- Poles and controller cabinets,
- Traffic monitoring stations,
- Enforcement equipment and areas,
- Changeable message signs,
- Barrier-mounted signs, and
- Striping.

b) Smart Carpool Lane Electronic Toll System

There are options for how to design, develop, implement, operate and maintain the ETS, which must be analyzed so that an approved plan for development and implementation can be documented. The ETS must be compatible with the Bay Area's FASTRAK system, so that a patron can use any toll facility within the State.

The ETS development work includes, but is not limited to:

- a documented operations and maintenance strategy,
- the toll equipment design and selection,
- the enforcement strategy and the required equipment,
- the configuration of the equipment on the road,
- the data communication system selection,
- the back office hardware to operate the Smart Lane and to collect the tolls,
- the software to operate the Smart Lane and to collect the tolls,
- the necessary changes to the Bay Area Toll Authority's (BATA's) Service Center software, and
- an operations center.

SECTION 2: SERVICES TO BE PROVIDED

The ACCMA intends to retain a qualified professional firm/team to provide public education and marketing services for the I-680 Smart Carpool Lane. It is expected that the contract period will commence in early summer 2006 and extend over a period of three plus years until opening of the facility in early 2010. Experience with working on HOT Lanes or tolling facilities is desirable.

For the consultant work effort, the consultant shall be familiar with and responsible for providing and performing the following tasks and activities. Additional tasks may be added as the ACCMA and/or SSCLJPA determines to be necessary.

Scope of Work:

Task 1 - Public Education and Marketing Plan

The consultant shall prepare a detailed public education and marketing plan. The plan shall include, but not be limited to the following: research through public opinion polling; focus groups and selected interviews; branding of the I-680 Smart Carpool Lane; public and media relations; update and maintenance of the project website; preparation and implementation of additional public meetings; design and printing of all publications relating to the Smart Lane and facilitation of advisory committee(s) as needed. The plan should consider the following groups: potential Smart Lane customers; carpoolers; and drivers in mixed flow lanes. The plan shall include a schedule for the performance of each of the planned activities. Other tasks may be added if it is deemed appropriate by the proposers.

Deliverable: Final Public Education and Marketing Plan

Task 2 – Public Opinion Research

There are two components to this task: development and facilitation of focus group meetings and public opinion polling.

- A. The consultant shall outline and implement a plan for forming focus groups and identify how the information resulting from the focus groups can be used for the I-680 Smart Carpool Lane Project. Based on the approved plan, the consultant shall conduct focus group meetings and prepare a summary report and recommendations based on the results of the focus group meetings.
- B. The consultant shall conduct at least one public opinion poll and prepare polling results for presentation to the SSCL JPA.

Deliverables: Plan for focus groups; facilitation of focus group meetings and summary report and recommendations; public opinion polling instrument; polling results including cross tabulations.

Task 3 – Public Meetings

Public meetings may be required to solicit input on the final design or operations of the I-680 Smart Carpool Lane. Two meetings will be required during the contract period. The consultant will prepare all materials, complete all logistics associated with the meetings, facilitate the meetings, document comments and prepare a written report documenting the comments and responses to comments.

Deliverables: All associated logistics for securing the meeting sites and materials for the public meetings and summary reports.

Task 4 Branding and marketing of the I-680 Smart Carpool Lane

The consultant shall develop a branding and marketing strategy for the I-680 Smart Carpool Lane. This task includes development and printing of materials for public education and marketing for corridor users including carpoolers, potential Smart Lane customers and drivers in the mixed flow lanes. The existing project website will be updated and maintained for consistency with the approved marketing scheme.

Deliverables: Branding and marketing strategy; graphic design and print materials including method their distribution and update of project website.

Task 5 Marketing to Smart Lane Customer

The consultant shall assist in the implementation of the marketing strategies resulting from Tasks 2, 3 and 4.

Task 6 Stakeholder/Advisory Committee Support

The consultant shall support the JPA in the formation and facilitation of stakeholder/advisory committees if needed.

Deliverable: Recommendation on stakeholder/advisory committee participants; facilitation of meetings; meeting materials and meeting minutes.

Task 6 Media Relations

The consultant shall provide a media package and, when requested by the ACCMA, serve as a contact for print, radio and television media. The media package shall be updated and kept current as the I-680 Smart Carpool Lane approaches opening day.

Deliverable: Media package(s)

Task 7 Support for SSCL JPA and Management Steering Committee Meetings

The consultant may be requested to attend meetings of the JPA Board and Management Steering Committee from time to time.

Deliverable: For budgeting purposes, assume attendance at up to 10 meetings.

Task 8 Attendance at Project Team Meetings

The consultants may be requested to attend meetings of the I-680 Smart Carpool Lane Project Team

Deliverable: For budgeting purpose, assume attendance at up to 10 meetings

SECTION 3: SBE AND LBE REQUIREMENTS

ACCMA has adopted a Small Business Enterprise (SBE) Policy, pursuant to which the ACCMA encourages all prime contractors to utilize qualified SBE subcontractors on ACCMA projects, ACCMA promotes the direct purchase of goods from qualified SBEs by utilizing SBE vendors when such vendors are available and the price of the goods sought is reasonable, and, for professional services contracts, ACCMA seeks the utilization of qualified SBEs when such SBEs are available. All prime contractors are required to report on SBE usage during the term of each contract, using a form provided by ACCMA.

For purposes of ACCMA's SBE Policy, an SBE shall be a "small business" within the meaning of 13 CFR Part 121 and California Government Code Section 14837. In the event that the ACCMA's SBE Policy conflicts with any Federal, State or other funding source's programs, policies, regulations or requirements, ACCMA shall make the SBE Policy consistent with said funding source's programs, policies, regulations and requirements to the extent permissible by law. ACCMA's SBE Policy is neutral as to race, ethnicity, national origin, age, sex, religion, sexual orientation and other protected classes.

ACCMA has also adopted a Local Business Enterprise (LBE) Policy, pursuant to which the ACCMA encourages all prime contractors to utilize qualified LBE subcontractors on ACCMA projects. ACCMA promotes the direct purchase of goods from qualified LBEs by utilizing LBE vendors when such vendors are available and the price of the goods sought is reasonable, and, for professional services contracts, ACCMA seeks the utilization of qualified LBEs when such LBEs are available. All prime contractors are required to report on LBE usage during the term of each contract, using a form provided by ACCMA.

SECTION 4: DBE PROGRAM PLAN / DBE AVAILABILITY ADVISORY

As noted above, this contract will be partially funded with federal funds. As a condition of receiving federal funds, ACCMA has signed an agreement with Caltrans pursuant to which ACCMA has agreed to implement Caltrans' Disadvantaged Business Enterprise (DBE) Program Plan (hereinafter referred to as the DBE Program Plan) as it pertains to local agencies. The DBE Program Plan is based on U.S. Department of Transportation (DOT), Title 49, Part 26, Code of Federal Regulations requirements.

Pursuant to the DBE Program Plan and ACCMA's agreement with Caltrans, ACCMA has determined that DBEs can reasonably be expected to compete for the subcontracting opportunities in this RFP, and has established a DBE Availability Advisory of 3%. It is therefore, ACCMA's expectation that available DBE firms have an opportunity to participate in this project.

Please refer to the Notice to Bidders/Proposers – Disadvantaged Business Enterprise Information attached to this RFP as Attachment 3 for further information on the DBE Availability Advisory, Caltrans' DBE Program Plan, and the requirements thereof.

SECTION 5: RFP SUBMITTAL REQUIREMENTS

Please prepare your proposal in accordance with the following requirements.

1. *Proposal:* The proposal (excluding resumes and the transmittal letter) shall not exceed a total of the equivalent of 25 single-sided, 8.5" x 11" pages. Resumes should be included in an appendix.
2. *Transmittal Letter:* The proposal shall be transmitted with a cover letter describing the firm's/team's interest and commitment to the proposed project. The letter shall state that the proposal shall be valid for a 90-day period and that staff proposed are available to begin work on this contract upon approval by the ACCMA Board. The person authorized by the firm/team to negotiate a contract with ACCMA shall sign the cover letter and the letter should include the name, title, address and telephone number of the individual to whom correspondence and other contacts should be directed during the consultant selection process.

Address the cover letter as follows:

Jean Hart, Deputy Director
Alameda County Congestion Management Agency
1333 Broadway, Suite 220
Oakland, California 94612

3. *Project Understanding:* This section should clearly convey the consultant's understanding of the nature of the work and the general approach to be taken.

4. *Work Plan and Schedule.* This section should include a description of how each task of the project will be conducted, identification of deliverables, and a schedule. The Work Plan should have sufficient detail to demonstrate a clear understanding of the project. The schedule should show the expected sequence of tasks and important milestones.
5. *Management Approach and Staffing Plan.* This section should describe the consultant's approach to management of the work. If the proposal is a team effort, the distribution of work among the team members should be indicated. This section should discuss the consultant's organization for this project, how the work assignments are structured, and the staffing. A chart showing the amount of time each key team member is devoting to the project should be included. The consultant shall describe the role of any subcontractors, with a description of the subcontractors' specific responsibilities. Discuss the firm/team's approach for completing the services for this project within budget.

The proposal should include a staffing plan (by quarter) and an estimate of the **total hours** (detailed by position). The staffing plan should also identify the hours required to complete each of the tasks listed in Section 2 above and the total hours for the overall project.

6. *Qualifications of the Firm.* This section should provide a description of previous projects, which clearly demonstrate the consultant's experience and qualifications to perform the public education and marketing for a toll facility. Experience working on other HOT Lanes or toll facilities is desirable. These descriptions should identify the role, if any, of key personnel assigned to conduct the project, and the outcome of the project. Provide a list of up to three former clients for whom consultant's firm and team members have performed services similar to those described in this RFP, along with names and telephone numbers of persons who may be contacted as references. If subcontractors are to be used, provide similar information for each subcontractor.

Key personnel are expected to be committed for the duration of the project. Replacement of key personnel will not be permitted without prior consultation with and approval of the ACCMA.

7. *Submittal of Proposals:* Ten (10) copies of your proposal are due at the ACCMA offices no later than the time and date specified in Section 7 below. Envelopes or packages containing the proposals should be clearly marked, **"Proposals Enclosed."**
8. *Cost Proposal:* A cost proposal should be submitted in a **separate sealed envelope titled "Smart Carpool Lane Cost Proposal."** The cost submittal should indicate the number of anticipated hours by the Project Manager and key personnel. The estimated level of hours for other staff can be summarized in general categories.

SECTION 6: SELECTION OF CONSULTANT

The overall process will evaluate the technical components of all the proposals completely and independently from the cost component. The proposals will be evaluated and scored on a 100 point total basis using the following criteria:

1. Qualifications and specific experience of Key Personnel.
2. Project understanding and approach, including an understanding of the ACCMA and coordination processes.
3. Marketing and public education experience. Experience with HOT Lanes or Tolling facilities is desirable.
4. Satisfaction of previous clients.
5. Schedule and capacity to provide qualified personnel.

Interviews will be held on the date specified in Section 7 below. The Project Manager and Key Personnel should attend the interview. The evaluation / interview panel may include representatives from ACCMA, Caltrans, ACTIA and other agencies, but the specific composition of the panel will not be revealed prior to the interviews. Costs for travel expenses and proposal preparation shall be borne by the consultants.

Once the top firm/team has been determined, ACCMA staff will start contract negotiations with firm/team. If contract negotiations are not successful, the second ranked firm/team may be asked to negotiate a contract with ACCMA, etc. Provided the negotiations are proceeding well, the ACCMA may elect to initiate a portion of the work scope with a Notice to Proceed (NTP), prior to execution of the contract.

SECTION 7: SELECTION PROCESS DATES

June 9, 2006	All questions pertaining to this RFP should be emailed Jean Hart no later than June 9, 2006 at the following email address: <u>jhart@accma.ca.gov</u> .
June 13, 2006:	A Pre-proposal Meeting will be held at 10:00 a.m. at the ACCMA offices
June 30, 2006:	Proposals are due no later than 3:00 p.m. on June 30, 2006 at the offices of the Alameda County Congestion Management Agency, 1333 Broadway, Suite 220, Oakland, CA 94612. <i>Late submittals will not be accepted.</i>
Week of July 17, 2006	Interviews for consultant selection will be held the week of July 17, 2006

All questions pertaining to this RFP should be emailed to Jean Hart, Deputy Director, Planning, at the following email address: jhart@accma.ca.gov. All such emails must include the subject line "ACCMA RFP A06-019 Question:" and then the stated question in the body of the email. ACCMA will be unable to provide individual responses, and ACCMA will not respond to questions posed by any means other than email. Responses to all questions submitted by the above deadline that may have a material impact on the proposal will be provided to all attendees of the pre-proposal meeting discussed above, and will also be posted on the ACCMA website: www.accma.ca.gov.

SECTION 8: GENERAL CONDITIONS

A. Limitations

This RFP does not commit the Alameda County CMA to award a contract or to pay any costs incurred in the preparation of a proposal in response to this RFP.

B. Rejection of Proposals

The Alameda County CMA reserves the right to reject any or all proposals.

C. Award

All finalists may be required to participate in negotiations and to submit such price; technical or other revisions of their proposals as may result from negotiations. Accordingly, each initial proposal should be submitted on the most favorable terms from a price and technical viewpoint.

D. Workscope Modifications

The ACCMA reserves the right to request changes to the staffing and/or scope of services contained in any of the proposals and to enter negotiations with any of the proposers regarding their submittal.

E. Contract

A sample contract is shown in Attachment 2. It is expected that the terms of the contract will be acceptable to the consultant.

F. Non - Discrimination

Contractors shall not discriminate on the basis of race, color, national origin, sex, or physical disability in the performance of ACCMA contracts.

G. Levine Act

Selected consultants will be required to disclose on the record any contribution of more than \$250.00 which they have made to a ACCMA Board member within the twelve-month period preceding the submittal deadline of this RFP. This applies to your company, any member of your team, any agents for you or other team members and to the major shareholders of any closed

corporation, which is part of your team. If you have made a contribution which needs to be disclosed you must provide written notice of the date, amount and receipt of the contribution(s) to the ACCMA Executive Director, Dennis Fay. This information will need to be provided before the ACCMA can approve any contract.

SECTION 9: LISTS OF FIRMS THAT RECEIVED THIS RFP

See Attachment 2 for the list of firms that received this RFP.

Attachments:

- Attachment 1 – ACCMA Sample Contract
- Attachment 2 – List of firms that received notification of this RFP
- Attachment 3 – Notice to Bidders – Disadvantaged Business Enterprise Information